PeopleSoft
Creating and Viewing Budget Overview Inquiries
March 28, 2006

Breadcrumbs: Commitment Control > Review Budget Activities > Budget Inquiry > Budgets Overview

The Budgets Overview inquiry component provides summarized and detailed information about activity across several control budgets.
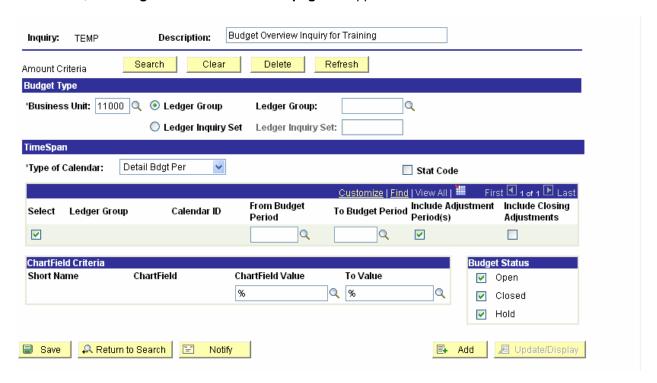
CREATING BUDGET OVERVIEW INQUIRIES

Use the above navigation to obtain the following screen:

On the **Add a New Value tab**, type a descriptive name (limited to 10 characters) for the budget inquiry you wish to perform within the 'Inquiry Name' field. Click the **Add** button.

At this time, the **Budgets Overview - Criteria page** will appear.

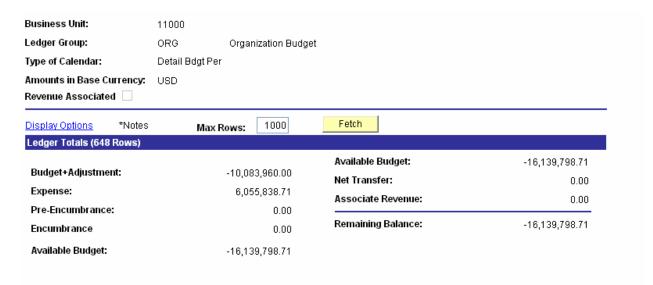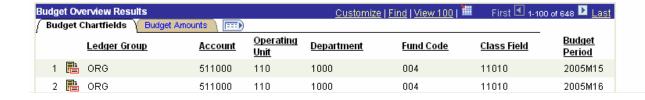|	
Business Unit	Your 5-digit Business Unit.
Ledger Group	Available Commitment Control Ledger Groups include APPROP, APP_LN, and ORG.
Type of Calendar	Detail Bdgt Per (detail budget period calendar)
From Budget Period	Beginning Budget Period for inquiry. Format for entering Budget Period is YYYYMxx where YYYY is the last year of the biennium and Mxx is the month of the biennium. For example, 2007M01 represents July 2005 and 2007M13 represents July 2006.
To Budget Period	Ending Budget Period for inquiry. Format the same as **From Budget Period**.
ChartField Criteria	Enter the ChartField values for the budget you want to view. You can use the **ChartField Value** and **To Value** fields to enter a range of values. You can also use the % wildcard. For example, enter 2% in ChartField Value field to see all accounts that begin with 2, such as 200000 to 299999, or enter 2% in the ChartField Value field and 35% in the To Value field to see all accounts between 200000 and 359999.

Click the **Save** button. Click the **Search** button to open the **Budgets Overview page**, where you can view the results of your inquiry.

VIEWING BUDGET OVERVIEW RESULTS

After the search for budget results is complete, the following **Budgets Overview page** will appear:

Business Unit:	11000	
Ledger Group:	ORG	Organization Budget
Type of Calendar:	Detail Bdgt Per	
Amounts in Base Currency:	USD	
Revenue Associated ☐		

Display Options   *Notes   Max Rows: [1000]   Fetch

Ledger Totals (648 Rows)

		Available Budget:	-16,139,798.71
Budget+Adjustment:	-10,083,960.00	**Net Transfer:**	0.00
Expense:	6,055,838.71	**Associate Revenue:**	0.00
Pre-Encumbrance:	0.00		
Encumbrance	0.00	**Remaining Balance:**	-16,139,798.71
Available Budget:	-16,139,798.71		

Budget Overview Results   Customize | Find | View 100 | ⊞   First ◄ 1-100 of 648 ► Last

Budget Chartfields \ Budget Amounts \ [≡≡)

	Ledger Group	Account	Operating Unit	Department	Fund Code	Class Field	Budget Period
1	ORG	511000	110	1000	004	11010	2005M15
2	ORG	511000	110	1000	004	11010	2005M16

Display Options	Click to open the Budget Display Options page, where you can specify how to summarize and sort the budget data in the **Budget Overview Results** scroll area.
Max Rows	Enter the maximum number of budget ledger rows that you want to appear in the Budget Overview Results area.
Fetch	Click to refresh the page after changing display options and maximum row specifications. **NOTE:** Changes to the display options and maximum rows can change the ledger totals.

Ledger Totals

This group box displays the summarized ledger totals for the ledger rows fitting the criteria you set on the Budgets Overview – Criteria page, along with amounts, such as available budget, calculated from the ledger totals. The amount in parentheses in the parentheses in the group box header represent the total number of rows in the Budget Overview Results scroll area. The ledgers and calculated amount types that appear vary, depending on whether you are viewing expense budgets, revenue budgets, or both, and if there are associated budget for the control budget.

Budget Overview Results

This grid displays the results of your selection criteria and your display options. It displays either detail rows or summarized ledger rows, depending on your selection criteria and your display options.

 | Click the **Show Budget Details** button to open the Budget Details page, where you view budget details for the ledger. |

-10,769.00 | Click budget ledger amount to link to the Budget Journal page, where you can view the budget journal lines. All other ledger amounts link to the Budget Details – Activity log page, where you view the transaction lines for the ledger. |